



Job Description

Job Title: HOA Account Associate
Business Line: Commercial Lines – HOA Division
Reports To: Laurie Olson, Vice President
FLSA Status: Non-Exempt
Approved By: Laurie Olson, Vice President
Approved Date: January 2, 2018

OUR MISSION:

Our mission is to establish long-term, mutually beneficial financial relationships with our clients, team members and community. We will:

- Recruit, reward and retain a team of market leading professionals
- Collaborate with clients to analyze and understand their financial challenges and opportunities
- Develop and provide access to a unique set of financial solutions
- Directly engage in community social, educational and philanthropic activities

SUMMARY:

The Account Associate is responsible for providing routine service, customer support, and administrative support to a team of Account Managers and Account Executives.

JOB RESPONSIBILITIES INCLUDE, NOT ARE NOT LIMITED TO THE FOLLOWING:

- Provide prompt, accurate, and friendly customer service
- Provides data entry and customer service relating to certificates of insurance, auto ID cards, billing, coverage detailing in EPIC, audits, change requests and endorsements
- Work with the HOA Team on all aspects of the Association renewal process
- Follow up on suspense items and activities
- Participates in training to enhance knowledge and skills and remains current with industry changes
- May occasionally require overtime at the discretion of management
- Maintain a strong work ethic with a total commitment to success each day
- Performs other duties as assigned

REQUIRED EXPERIENCE & BACKGROUND

- 1-3 years' experience and general insurance knowledge with Commercial Lines products and markets preferred
- Possession and maintenance of a Multi Lines Insurance license for the State of Colorado preferred
- Integrity, professionalism, and positive work attitude
- Dependable, responsible, able to take direction and willingness to learn and be flexible in the work environment
- High energy, excellent organizational skills, and detail-oriented self-starter
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- Self-motivated, proactive in problem solving, organized, ability to work independently and on a team and maintain attention to detail
- Strong computer skills with tools such as Outlook, Excel, Word and EPIC
- Excellent interpersonal and communication skills – written, verbal and listening
- Ability to effectively interact and relate to customers, vendor companies, employees and work in a team environment
- Ability to learn and perform new duties and responsibilities



An Affiliate of Central Bancorp

Note: This job description is not intended to be an exhaustive list of all duties, responsibilities or qualifications associated with this job. The employee is expected to perform those duties listed as well as other related duties directed by management.